

Item Title: Taxpayer Appeals Portal

Specific Action Requested:

That the Board of Commissioners authorizes the County Manager to enter into a multi-year contract with E-Ring, Inc. for the implementation of a public Tax Appeals Portal subject to terms and conditions acceptable to the County Attorney.

Item Summary:

Purpose: Multi-year service agreements require the Board of Commissioners' approval.

Background: Tax Administration received nearly 25,000 informal and formal appeals for the 2024 revaluation. Of these, roughly 10,000 were submitted online. Other methods to submit an appeal are mail and in person at the Tax Administration office in the Wake County Justice Center.

The current tax portal does not support taxpayer ability to track the status of their appeal, receive centralized communication regarding their appeal, exchange information between appraisal staff and the appellant in a consolidated manner, or allow an appellant to receive electronic notification of scheduled appeal hearings. Communication is limited to disparate emails, phone calls, and mailed correspondence. The portal also does not easily integrate with the Department's Computer Assisted Mass Appraisal (CAMA) software. There is a need for an updated and modern appeal portal available for the next revaluation, effective January 1, 2027.

Strategic Plan: This action supports routine County operations.

Fiscal Impact: The current year's cost is \$187,000 and is included in the FY 2026 budget. Future recurring costs of \$141,250, escalating 5% a year, will be paid through Tax Administration's revaluation budget.

Additional Information:

Wake County Tax Administration manages over 440,000 parcels, representing an increase of 75,000+ parcels over the past decade. While appeals represent a relatively small percentage of total parcels, they generate a significant volume of customer interactions. For the 2024 revaluation, nearly 16,000 informal and almost 9,000 formal appeals were submitted.

The current tax portal was built internally and needs enhanced. It is insufficient to support the level of service and attention required to accommodate the volume of parcels and appeals. It lacks the ability for taxpayers to submit appeals with sizeable attachments, track appeals from initiation to resolution, receive automated notifications regarding the

status of their appeal, allow two-way communication between appraisers and appellants, and maintain a complete history of all documentation and communication regarding an appeal. If a taxpayer misplaces an access code, they must wait until routine business hours to speak with staff to gain access to the portal, an outdated business model unlike most online applications that have two-factor identification. In addition, there is a need to better integrate the Tax Portal with CAMA and improve hearing scheduling and correspondence.

Due to staff constraints and the prioritization of re-writing the County's Computer Assisted Mass Appraisal (CAMA) system in current code, Tax Administration seeks an external software solution for the appeal portal. The E-Ring, Inc. appeals portal exhibits all required functionality in production, is customizable and flexible to implement based on available resources and priorities and can incorporate future enhancements quickly. The software will better serve taxpayers for the next revaluation, effective January 1, 2027.

Attachments:

None.